

Project Managers' Advisory Group

MINUTES November 19, 2007

Attending:

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|------------------|-------|
| Bob Giannuzzi | EPMO |
| Kathy Bromead | EPMO |
| Linda Lowe | EPMO |
| Barbara Swartz | EPMO |
| Jim Tulenko | EPMO |
| Charles Richards | EPMO |
| John McShane | EPMO |
| Jesus Lopez | EPMO |
| Gaye Mays | EPMO |
| Charles Fraley | DHHS |
| Dell Pinkston | DOA |
| Lucy Cornelius | DPI |
| David Butts | WRC |
| Stan Jenkins | ITS |
| Carla Thorpe | DOT |
| Cheryl Ritter | DOT |
| Jim Skinner | DOI |
| George Fenton | DOJ |
| John Gary | NCCCS |

Bob Giannuzzi welcomed everyone to the meeting. There were no new PMPs to recognize this month.

Bob then introduced **Kathy Bromead** as the new EPMO Director. **Kathy** commented on the importance of the EPMO providing value to the agencies in facilitating delivery of successful projects.

Bob called for approval of the October minutes. Minutes were approved.

Linda Lowe reported that the PMP Exam Prep class wrapped up last week with a practice session. **Jesus Lopez** thanked her for a job well done in filling in for him as administer of this program for this cycle. **Linda** noted that a few students already scheduled their exam and that two of them were audited on evidence of their prerequisites. In regard to the Certified Associate in Project Management (CAPM) credential, **George Fenton** pointed out that the only difference in the exam is that there are no questions on professional responsibility (also lesser PM experience and training requirements).

NCPMI news was covered next. **John McShane** reported that the chapter's mentoring program is still in planning. The next PS LIG to be held on December 6 will feature a presentation on *Quality Assurance Process in Software Development*. There will be no December general membership meeting.

Bob Giannuzzi called for updates from the Task Groups.

- **PM Tools Gaye Mays** reported that an overview of scheduling and portfolio management tool assessments to date will be presented to the SCIO. A proof of concept project will likely be proposed.
- **Methodology Barbara Swartz** reported that work on checklists for Gate 1 and 2 approvals has progressed and should be ready for review at the December PMAG meeting.

Bob passed out the following information on upcoming teleconferences of interest to the PM Advisory Group.

| Organization/website | Contacts | Upcoming Calls |
|--|---|---|
| NASCIO http://www.nascio.org/committees/projectmanagement/ | Stephanie Jamison 859/514-9148 sjamison@AMRms.com Access 888/272-7337 conference ID 6916986 | <u>January 8</u> (3:00) IT Succession Management: California's Plan |
| PMO Executive Council http://www.pmo.executiveboard.com/ | Register at website | <u>November 28</u> (12:00) Effective Project Stakeholder Relationship Management <u>December 4</u> (12:00) Drivers of Project Manager Effectiveness: Quantitative Benchmarking Results |
| CIO Executive Council http://www.cio.executiveboard.com/ | Register at website | <u>November 29</u> (10:00) Quantitative Analysis of the Drivers of Effective IT-Business Relationships |
| Application Executive Council http://www.aec.executiveboard.com/ | Register at website | <u>November 29</u> (11:00) The Applications Lifecycle Cookbook, Part Two <u>December 6</u> (6:00 PM) Increasing Business Intelligence ROI Through Data Quality Management |
| Infrastructure Executive Council http://www.iec.executiveboard.com/ | Register at website | <u>December 20</u> (11:00) Key Developments in Information Risk |
| Information Risk Executive Council http://www.irec.executiveboard.com/ | Register at website | <u>November 20</u> (11:00) Intellectual Property Protection Series 3: Effective IP Incident Response Protocols <u>November 29</u> (11:00) Organizational Planning Information Risk Budget and Spend Benchmarks |
| Enterprise Architecture Executive Council http://www.eaec.executiveboard.com/ | Register at website | <u>November 27</u> (12:00) Institutionalizing Enterprise Information Management <u>December 12</u> (12:00) EA Governance Models |

Bob informed that the EPMO is still looking to make improvements in form and value of the EPMO website (<http://www.epmo.scio.nc.gov>).

Next **Stan Jenkins** of the Enterprise Technical Architecture team gave his perspective on how PMs should address the system design documentation required at Gates 2 and 3. He suggests that the SDD development should be included in the project WBS. He also advised that PMs should seek out the right technical SME to complete these tasks and not feel they need to take them on themselves. **Stan** also discussed timely submission to ETA.

Bob then presented the results of the recently completed EPMO survey. There were 37 responses from 16 agencies. **Bob** noted that the results correlated closely with the information provided by sample agencies/projects in the EPMO Assessment. The EPMO tactical plan is addressing the areas of concern. **Bob** thanked those who participated. The presentation file will be circulated with the minutes.

Training was the next topic of discussion. **John McShane** announced that Requirements training has been booked for the week of 1/24 (capacity = 25). He also pointed out that DOT has scheduled Mercury training for 8 of its people. John circulated documentation of a vendor's offering of 4 courses for BAs. These 2 and 3 days sessions can be brought onsite for about \$200/student day at about 20 students/class. He will send out directions to the vendor's website that gives details on these courses. John would like a show of interest by the next PMAG meeting. **John** reported that the vendor presentation to the EPMO of an Estimating course was well received by the agency CIOs and CFOs in attendance. Other vendor options are being examined. The goal is to bring the 3-day course in-house.

Cheryl Ritter inquired about the status of career banding of PMs. **Bob** replied that he had heard that the moratorium on creating new bands has been lifted, so he met with OSP to review what we had done last year. At this time, OSP will not work on PM bands. **Dave Butts** commented that WRC uses the BTA Analyst band for PMs.

Jim Tulenko reported that after the PPM tool has been configured to handle the new Non-Approved project process and that **Kathy Bromehead** had sent the process documentation to the CIOs.

Linda Lowe proposed that the PM Education and Promotion Work Group be resurrected to bring the PM value proposition to the attention of executive management. She pointed out that Vicky Kumar recently gave an NCPMI presentation on selling project management. **Lucy Cornelius** suggested communications to execs about EPMO and ITS events and initiatives might be more effective if the communications were tailored to that specific audience. **Stan Jenkins** stated that he had attended an architecture conference held for CIOs, CFOs and business execs that was well received. He thinks this type of forum is a viable model for a one day session on PM.

Bob mentioned that there were 5 project closeouts this month – newly available Lessons Learned were handed out and attached.

Meeting adjourned at 4:40.

NEXT MEETING - Monday, December 17, 2007

Lessons Learned Documentation

Exhibit A

NCDA&CS: Emergency Programs Google Earth

1. **LESSONS LEARNED** - What were the positive lessons learned (project strengths) from this effort?

Product is effective as a GIS viewer, and is very extendable. It provides a straightforward platform to quickly and effectively disseminate information to a broader range of people than going through the ESRI products. ESRI products are still needed for the analytical process, but Google Earth provides an easier viewer to navigate for those users who are unfamiliar with ESRI.

2. **LESSONS LEARNED** - What opportunities for improvements (project weaknesses) were learned with this project?

Initial disk space requirements were under actual needs. NC Dept. of Agriculture and CS was one of the first state wide agencies to implement Google Earth. The requirements given to us by Google were more in line with a county or municipality's needs.

Exhibit B

DPI Online Educational Services for Student Achievement Improvement

Please use the attached *Project Closeout Review* questionnaire to evaluate the information technology project results for the **DPI Online Educational Services for Student Achievement Improvement** project.

LESSONS LEARNED - What were the positive lessons learned (project strengths) from this effort?

- The vendor was very responsive to the requirement for NCID authentication integration
- This was an effort very close to the heart of the business sponsor/customer and therefore very engaged in the effort.

LESSONS LEARNED - What opportunities for improvements (project weaknesses) were learned with this project?

- Under anticipating the questions that would be asked during the approval process especially concerning the technical environment caused the process to take longer than expected. Better preparation and experience in the process will help expedite in the future.
- Overall, a better understanding of the PPM tool and the information necessary for going forward in the process will help expedite in the future.
- A better understanding of the Budget entries and how the PPM tool processed those entries would have saved time required for corrections later.
- Discussing and documenting lessons learned after each phase will ensure more complete and timely analysis of what was done right and what needed improving during the phase.
- Needed better collaboration and communication with the NCID staff to better assess the magnitude of effort it would take to implement statewide at each LEA and Charter Schools

Exhibit C

Dept. of the State Treasurer – Unclaimed Property Program – Integrated Document Management System

What were the **positive** lessons learned (project strengths) from this effort?

1. A robust testing effort led to a better final product – by focusing more on rigorous testing and strictly controlling late changes, the application is much more robust. Although it took a lot of effort, developer testing was extremely important to identify and correct defects before the users saw the product. We needed to build customer comfort in the product and showing it to them too early in the development process would have undermined confidence in the developers and the product.

2. The key to success was a dedicated group of business users led by a business user with broad process knowledge. The business team leader did an excellent job preparing the staff for the requirement gathering phase and got them thinking about their jobs in anticipation of the questions that would be asked. The core group of users was kept involved throughout the project – analysis, the drafting of test scenarios, the evaluation of training materials and documentation, and user acceptance testing. The business team led facilitated document review and feedback and made sure we had comprehensive review of all early phase documentation and design, leading to a better final product.

3. Project meetings should be small, short and frequent and only include designated leaders for groups of individuals working on the project. We met every week by phone conference, used a fixed agenda, and we accomplished a lot at those meetings because there was no wasted time or space - there was a business lead, tech services lead, development lead, vendor lead, and occasionally a Q/A advisor. Everyone would report on the progress for the people they were responsible for and everyone was authorized to make the decisions for the group they led.

4. Training was planned from the business perspective, not the technology perspective. We spent little time training on the tool, but rather, developed training to be in the context of business operations.

5. Always plan for the least expected. Risks were realized.

What **opportunities for improvements** (project weaknesses) were learned with this project?

1. The Backfile Conversion and the System Development should have been split into two separate RFP's and contracts. Conversion of documents and application development are widely divergent skill sets and by using two different vendors, we could have had two companies with different core competencies, rather than one vendor that is excellent at application development, but with less skill at document conversion. It was also too much for a single company to deal with – the core activities are different and at different points in the project, one activity would be favored at the expense of the other.

2. The Backfile Conversion of Historical Documents did not go as planned – the quality and quantity of original documents were not expected/anticipated.

3. Q/A Advisors should have been involved in the early planning of the project. The major schedule change after beginning Execution and Build occurred on the advice of the Q/A Advisor to expand the testing methodology. Fortunately, the project stakeholders agreed to a schedule shift, but understanding testing needs in planning will help to set better expectations.

Exhibit D

ESC - VoIP Telephony Solution for ESC UI Division, Central Office

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| What were the positive lessons learned (project strengths) from this effort? |
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| <i>Description</i> |
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| <ul style="list-style-type: none"> • ACD for Tax Status works well and has improved unit's productivity |
| <ul style="list-style-type: none"> • Training activities were well coordinated overall, facilities were comfortable and adequate, trainers used a team approach, and the material covered was sufficient to prepare the different user groups for the use of the new system. |
| <ul style="list-style-type: none"> • War room was established for use during and after implementation. |
| <ul style="list-style-type: none"> • Unit "champions" were identified and trained to act as first line of defense when questions or problems arose |
| <ul style="list-style-type: none"> • ITS provided on-site support for first two days of implementation |
| What opportunities for improvements were learned within this project? |
| <i>Description</i> |
| <ul style="list-style-type: none"> • Tasks involved in and teams responsible for gathering business requirements and recommending and producing application design were not clearly delineated. Overlapping of these areas caused frustration for UI staff due to conflicting information, duplication of efforts and excessive meetings. |
| <ul style="list-style-type: none"> • Conflict between ITS team members should be taken off line and not aired during business meetings or in front of customers |
| <ul style="list-style-type: none"> • Vendor should provide, up front, standards or guidelines for available options. Commitments were implied early on and then reversed during design efforts as being too much work or not supportable with existing staff. Standards for service offerings were published after the fact. Some changes requested by Employment Security Commission took months to complete. There should have been clearly defined dates as to how long it would take to make those requested changes. |
| <ul style="list-style-type: none"> • After the initial rollout of VoIP telephone handsets and the VoIP system, changes were requested by Employment Security Commission ITS was unable to immediately commit resources to resolve trouble tickets and begin redesign efforts There should have been clearly defined dates as to how long it would take to make the requested changes. |
| <ul style="list-style-type: none"> • Vendor should ensure adequate time for programming and thorough testing of all components of phone system before cutover. |
| <ul style="list-style-type: none"> • Vendor should ensure scheduled installation allows adequate time for support during implementation and for a reasonable time period immediately after implementation. |
| <ul style="list-style-type: none"> • Key staff should be available during implementation and for a reasonable time period immediately after implementation. |
| <ul style="list-style-type: none"> • Vendor should establish use of Change Control process with clearly identified central point of control for both agencies. Changes were made on the fly without proper approval, leading to confusion and dissatisfaction. |
| <ul style="list-style-type: none"> • Recommend that vendor has assigned independent Project Manager on future projects of this type. |
| <ul style="list-style-type: none"> • Ensure samples of all reports requested by business units and committed to by vendor are provided and understood prior to implementation. |
| <ul style="list-style-type: none"> • Ensure all call flow diagrams and documentation have appropriate version control, to ensure everyone is looking at the same version of a document or process under discussion |
| <ul style="list-style-type: none"> • Ensure that Agency has current documentation describing each area's telephony design. |
| <ul style="list-style-type: none"> • Training documentation to be provided by the vendor should be delivered well in advance to ensure Agency print shop has adequate time to print copies for training classes |
| <ul style="list-style-type: none"> • Employment Security Commission must clearly define responsibilities in managing projects, and work towards strengthening relationship between the PMO and business area. |
| <ul style="list-style-type: none"> • Procedures for handling VoIP problems needs to be defined and documented between ESC Help Desk and business area. |
| Key Factors Contributing to unsatisfactory implementation:: |
| <i>Description</i> |

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| <ul style="list-style-type: none"> No assessment or information was provided regarding likelihood of significant increase in call volume when moving from Toshiba key system with limited lines providing busy signals, to VoIP system with vastly larger capacity for incoming calls. |
| <ul style="list-style-type: none"> Increased call volume caught UI by surprise and overwhelmed most business areas Solutions provided to several areas did not meet needs due to increased volume of calls, leading to a significant amount of redesign being required and project extension of at 3 months. |
| <ul style="list-style-type: none"> Communications were poor overall. UI felt meetings were often not productive because their business requirements were either not clearly understood, or they were asked to change business procedures to mesh with proposed solutions. Customization that was promised initially became problematic once design sessions began. |
| <ul style="list-style-type: none"> Main lines were set up with voicemail boxes, however UI was not informed of this fact and only found out when citizens began complaining of getting a "mailbox full" message |
| <ul style="list-style-type: none"> Over 100 tickets were submitted through the ESC Help Desk in the week following installation. The volume of reported problems and tickets opened were overwhelming both to ESC and ITS Help Desks. Multiple items were submitted on single tickets. |
| <ul style="list-style-type: none"> During initial rollout older models (4620) VoIP telephones were delivered to the desktop. Newer telephones were delivered the next week. Users were not made aware that this would be occurring, had programmed their telephones and were then required to reprogram the telephones a second time. Users were also required to clear out and reset voice mailboxes after ITS installed a voice mail server in the ESC Central Office in January. |
| <ul style="list-style-type: none"> During the design phase ITS made a commitment to the UI Technical group for monthly hunt group reporting. ITS was asked to provide sample reporting to ensure users' needs were being met. The project has been held open many months awaiting the reporting samples and final reporting product. The reports that have been provided have been a manual effort on ITS's part, have been provided sporadically, and do not contain accurate or useful information. It has been determined that ITS is unable to provide accurate hunt group reporting and that the content of the available reporting, hour of highest call volume, does not meet UI's reporting needs for hourly reporting. <p>In the future ESC will insist that all requirements have been adequately addressed before implementation.</p> |

Exhibit E

DPI - NCDPI School Connectivity Planning

- LESSONS LEARNED** - What were the positive lessons learned (project strengths) from this effort?

The inequities of statewide K12 connectivity were identified and a solution was put forth.

- LESSONS LEARNED** - What opportunities for improvements (project weaknesses) were learned with this project?

The EPMO should become more aware of projects objectives at the beginning of a project rather than at the end. Just my observation, coming into the project myself at the end.

